

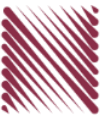


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, June 21th 2023



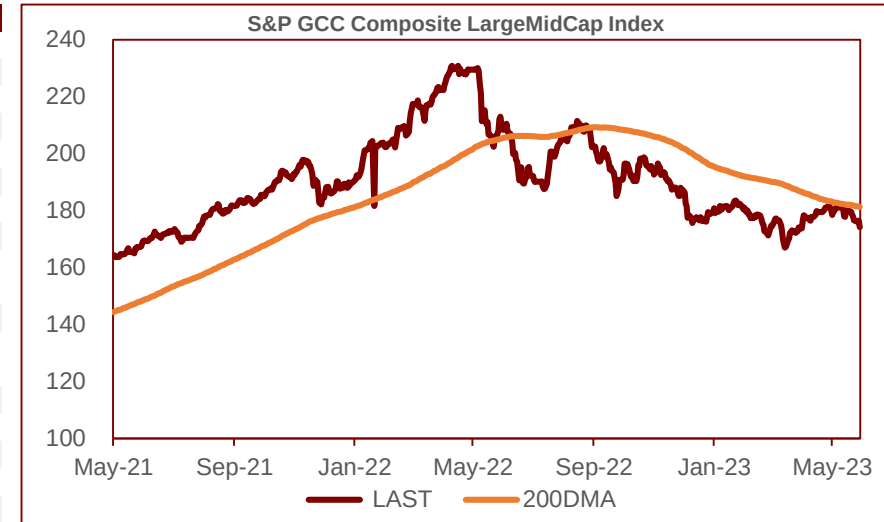


Market Watch

Wednesday, June 21, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,466.17	0.30	0.61	4.10	8.27	9.43	10,893 SAR	2.14	18.25
Qatar (QE Index)	10,243.05	-0.23	-0.14	0.87	0.30	-4.10	544 QAR	1.41	11.65
Dubai (DFMGI)	3,782.23	0.21	2.57	5.75	11.02	13.37	539 AED	1.45	19.72
Abu Dhabi (ADI)	9,490.47	0.28	1.48	0.89	0.64	-7.06	1,435 AED	1.80	20.89
Bahrain (BAX)	1,957.08	-0.01	0.14	-0.33	3.74	3.26	20 BHD	6.96	18.00
MUSCAT SE INDEX	4,721.69	0.85	1.35	2.06	-2.91	-2.79	5 OMR	1.00	13.25
SP GCC Comp LMC	179.54	0.24	0.73	3.05	3.38	0.43			
SP UAE PRICE INDEX	134.51	0.43	2.67	2.75	5.11	-2.17			
Developed Markets									
MSCI World Index	2,927.72	-0.40	1.58	4.54	4.88	12.49			
U.S. (S&P 500)	4,365.69	-0.52	1.67	4.45	6.24	13.70			
U.K. (FTSE 100)	7,559.18	-0.13	-0.53	1.52	-0.95	1.44			
Japan (Topix)	2,295.01	0.49	4.72	7.72	14.55	21.32			
Emerging Markets									
MSCI EM Index	1,004.27	-0.88	1.03	4.77	1.41	5.01			
China (SSE Composite)	3,197.90	-1.31	-0.49	-0.21	-2.29	3.52			
India (Sensex)	63,523.15	0.31	1.07	1.44	7.68	4.41			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,045.98	0.06	2.73	3.67	-0.07	-3.38	45.54 KWD	1.70	18.25
Kuwait Premier Index	7,833.09	0.15	3.00	4.52	0.15	-3.48	35.62 KWD	1.67	18.10
Kuwait Main Index	5,459.92	-0.31	1.65	0.35	-0.74	-2.45	9.92 KWD	1.81	18.82
NIC 50	8,924.74	0.22	2.99	4.51	0.14	-1.75	28.60 KWD	1.65	17.10
Kuwait Sector									
Banking	1,711.99	0.31	2.23	3.73	-2.33	-4.57	28.82 KWD	1.22	19.10
Telecom	1,110.06	0.26	1.85	1.25	-1.96	-6.04	3.41 KWD	1.36	8.83
Industrials	1,007.77	0.35	3.65	4.17	2.11	-6.59	3.55 KWD	0.83	21.11
Financial services	1,232.24	-0.70	4.34	4.06	3.03	-1.99	3.55 KWD	0.74	20.44
Real estate	1,204.26	-0.38	7.07	8.01	11.49	-0.37	2.61 KWD	0.59	22.25
Basic materials	912.58	-6.04	-2.27	-0.66	6.47	5.49	0.80 KWD	1.45	8.12
Health care	458.52	0.00	2.30	-0.07	0.67	-0.72	0.23 KWD	0.97	6.82
Consumer services	602.07	0.17	14.70	19.67	35.21	25.44	0.77 KWD	0.87	14.32
Insurance	2,123.76	-0.57	0.72	-0.58	11.19	36.94	0.87 KWD	0.82	10.80
Consumer Disc	1,566.93	0.68	1.34	1.75	7.18	5.39	0.18 KWD	1.09	0.00
Energy	970.68	-2.72	-3.14	-1.95	-2.73	-14.74	0.20 KWD	0.79	4.37
Technology	654.02	-1.21	4.53	-5.27	2.86	-6.06	0.01 KWD	0.81	0.00
Utilities	521.05	0.51	9.39	7.61	11.86	5.32	0.22 KWD	1.99	16.22



What Move the GCC markets

Oil Prices

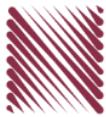
Oil prices held on to most of the previous day's gains in early trade on Thursday as markets weighed an unexpected draw in U.S. crude oil stocks against the prospect of weaker demand after the Federal Reserve chairman hinted at further interest rate hikes. Brent futures slipped 8 cents, or 0.1%, to \$77.04 a barrel

Kuwait Market

The market closed down today by + 0.06% at 7,045.98 value traded 33.6 million KD, Premier market value traded reached 28.5 million KD up + 0.15% at 7,833.09

KSA Market

The market closed up today by +0.3% at 11,466.17.

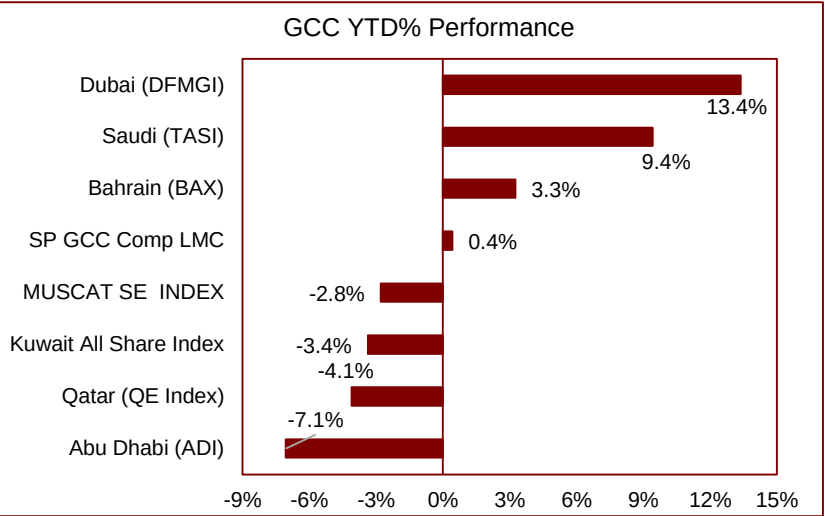


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.944	0.11	1.29	2.61	-6.14	-8.05	7.49 KWD	1.90	27.00
KFH	0.747	0.40	2.89	5.66	-0.52	-0.16	11.03 KWD	1.90	32.00
Zain	0.520	0.78	1.76	0.00	-3.70	-7.64	2.25 KWD	1.75	11.09
BOUBYAN BANK	0.640	0.47	3.73	6.67	5.51	-14.99	2.54 KWD	2.86	34.00
Agility	0.629	0.48	2.78	2.95	1.29	-12.64	1.68 KWD	0.88	22.67
Saudi Arabia									
ARAMCO	32.20	0.16	-0.77	2.22	9.66	10.34	7,793.85 SAR	5.22	13.84
SABIC	88.30	0.34	-0.79	0.11	-2.21	-1.23	264.95 SAR	1.42	35.00
STC	43.85	0.46	1.27	1.39	9.49	19.81	219.29 SAR	2.93	17.80
AL-RAJHI BANK	72.90	0.14	-0.68	3.11	-0.82	-3.06	291.65 SAR	2.94	16.97
NCB	36.70	0.14	-2.91	-0.54	7.25	-2.63	220.24 SAR	1.28	11.83
United Arab Emirates									
ETISALAT.AD	22.38	-0.09	-0.18	-3.03	1.45	-2.10	206.60 AED	5.10	21.10
FAB.AD	13.76	2.08	7.17	8.35	6.83	-19.53	152.03 AED	1.36	12.96
EMIRATES NBD	14.90	0.68	6.43	9.16	13.31	14.62	94.13 AED	0.98	5.63
DB ISLAMIC BK	5.41	-0.73	1.69	2.85	3.44	-5.09	39.18 AED	0.97	7.52
EMAAR PROPERT	6.53	1.24	7.40	6.18	16.61	11.43	57.72 AED	0.81	6.88
Qatar									
QNB	16.00	-0.62	-0.62	-0.06	-0.44	-11.11	147.78 QAR	1.45	10.56
INDUSTRIES QAT	11.31	0.89	-3.83	-5.59	-13.00	-11.71	68.43 QAR	1.87	9.40
QA ISLAMIC BK	17.70	-1.01	-0.84	1.03	-0.45	-4.63	41.82 QAR	1.57	10.81
MASRAF AL RAYA	2.59	-0.54	-1.00	1.41	-12.49	-18.45	24.05 QAR	1.02	19.67
MESAIEED PETRO	1.97	-0.56	-2.04	0.00	2.55	-7.43	24.74 QAR	1.52	15.53
OMAN									
BANK MUSCAT	0.274	2.24	2.62	4.58	-0.36	-0.36	2.06 OMR	0.95	8.33
OMANTEL	0.980	10.36	0.82	1.66	-10.91	6.52	0.74 OMR	1.21	7.69
BANK DHOFAR	0.174	0.00	0.58	-0.57	8.75	-0.57	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.278	1.09	1.83	1.83	3.73	-3.81	0.45 QAR	0.70	12.71
OMINVEST	0.370	2.78	1.09	0.00	-25.40	-11.90	0.25 QAR	0.69	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
14-June 23	24.3%	15.4%	0.06%	1.39%	0.23%	4.89%	17.66%	13.88%	6.14%	4.69%
21-June 23	24.29%	15.53%	0.06%	1.46%	0.24%	4.86%	17.64%	13.89%	6.19%	4.55%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is up today by + 0.06 %The leading sector best performance indices today are Consumer Disc 0.68 % Utilities 0.51 % Industrials 0.35 % respectively.

KSA
Saudi Armco has a positive performance today by + 0.16 %, SABIC have positive performance today by + 0.34%. STC has a positive performance today by + 0.46 %, Al Rajhi Bank has a positive performance today by + 0.14 %

U.A.E
ETISALAT .AD have negative performance today by -0.09 %, FAB.AD has a positive performance today by + 2.08 %.



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